Unit



Financial Recordkeeping

Learning Plans

Calculator

Spreadsheets

Checklists

Operate Calculator

Expense Reports

Database Design

Modifies/Deletes Records

Multiple Databases

Math Calculations—Spreadsheets

Spreadsheet Applications

Calculator Learning Plan

Why This Skill Is Important

Using the calculator and/or the 10-key pad on the computer is becoming more and more important today in the world of business. You will learn how to manipulate the 10-key number pad by touch, according to speed and accuracy standards.

Related Wisconsin Model Academic Standards for Business

B.12.3, C.12.6

Competency

Operate a calculator

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- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills

Performance Standards

Criteria-When your performance will be acceptable:

- □ you manipulate 10-key number pad by touch, according to preestablished speed and accuracy standards.
- you use special features of electronic calculator to perform calculations and/or verify calculations
- □ calculations are accurate
- □ you replenish paper and ink supply, as needed

Conditions—How you will be evaluated:

 \square in the workplace or classroom

Learning Activities

	1.	Manipulate 10-key number pad by touch, according to preestablished speed and accuracy standards.
	2.	Perform calculations and/or verify calculations using special features of electronic calculator.
	3.	Verify that the calculations are accurate.
	4.	Manipulate the calculator using computer software to solve business case problems.
	5.	Apply the 10-key number pad touch method to spreadsheet applications.

Spreadsheets Learning Plan

Why This Skill Is Important

Businesses use spreadsheets to analyze data and make decisions. In this learning plan you will learn how businesses use spreadsheet data to make business decisions by analyzing and creating spreadsheets. This learning plan addresses two competencies.

Related Wisconsin Model Academic Standards for Business

B.12.12, C.12.5, and C.BS.7

Competency 1

Use mathematical calculation features within spreadsheets

Linked Core Abilities

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you enter appropriate formulas into specific cell(s) to manipulate variable data as needed
- you use correct symbols for addition, subtraction, multiplication, and division
- you use parentheses correctly to indicate hierarchy of mathematical computations

Conditions—How you will be evaluated:

- ☐ in the workplace or simulated situation
- □ when required to make calculations

Competency 2

Use spreadsheet applications to analyze and make decisions

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards
Criteria—When your performance will be acceptable:
\square you create spreadsheet for a specific purpose
\square you create spreadsheet to manipulate variable data
$\ \square$ spreadsheet is organized in a logical, sequential manner
\square you appropriately label and format cells
Conditions—How you will be evaluated:
$\hfill\Box$ in the workplace or simulated situation
Learning Activities
1. Review basic mathematical computations.
2. Design spreadsheets for specific purposes.
3. Create business forms from spreadsheet information.
4. Print specific information from a spreadsheet.
5. Identify uses for spreadsheets in businesses.
6. Analyze spreadsheet information.
7. Make decisions based on spreadsheet information.
8. Create charts from spreadsheet data.
9. Integrate a spreadsheet with other software.
10. Maintain personal grades for class.
11. Listen to speaker who uses spreadsheets in business.
12. Share a spreadsheet used at work site.
13. Transfer spreadsheet files between disk/hard drive/server.
14. Publish FBLA financial data using spreadsheets.
15. Create a spreadsheet for student personal use.

Operate Calculator Checklist

Competency

Operate a calculator

Linked Core Abilities

Demonstrate basic academic skills Apply critical thinking and information processing skills

Directions

After you have practiced using a calculator to perform a variety of functions you will be asked to demonstrate these skills in the workplace and/or under supervision in the classroom. Your competence will be assessed by your supervisor or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Criteria	Rating Comments
1 you manipulate 10-key number pad by touch, according to pre-established speed and accuracy standards	yes no not observed
2 you use special features of electronic calculator to perform calculations and/or verify calculations	yes no not observed
3 calculations are accurate	yes no not observed
4 you replenish paper and ink supply, as needed	yes no not observed
5 you solve problems after choosing from a variety of mathematical techniques (Core Ability)	yes no not observed

Expense Reports Checklist

Competency

Complete expense reports

Linked Core Abilities

Demonstrate basic academic skills
Use effective personal and interpersonal skills
Apply critical thinking and information processing skills
Relate to the complex interrelationships of systems
Work with a variety of technologies

Directions

After you have practiced completing expense reports for simulated employees, you may be asked to complete a report of expenses for an employee(s) in the organization where you are working. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Criteria		Rating			Comments
1	you complete expense reports following the organization's guidelines	yes	no	not observed	
2	expense report includes claim for at least two of the following: meals, transportation, lodging, registration or other expenses	yes	no	not observed	
3	expense report contains accurate information	yes	no	not observed	
4	expense report contains complete information	yes	no	not observed	
5	reimbursement claims are calculated accurately	yes	no	not observed	
6	expense report is submitted, meeting the timeline requirements of the organization	yes	no	not observed	
7	you organize information (Core Ability)	yes	no	not observed	
8	you perform basic computations (Core Ability)	yes	no	not observed	

Database Design Checklist

Competency

Design a database

Linked Core Abilities

Demonstrate basic academic skills
Use effective personal and interpersonal skills
Apply critical thinking and information processing skills
Relate to the complex interrelationships of systems
Work with a variety of technologies

Directions

After you have gained some proficiency in designing a database for various business purposes, you will be asked to demonstrate your newly acquired skills to meet a specific need in the workplace and/or in a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Criteria	Rating	Comments
1 you create a database with at least three field	s yes no not observed	
2 you select appropriate data fields for the database	yes no not observed	
3 you select appropriate field width	yes no not observed	
4 you name fields in a database	yes no not observed	
5 you organize and maintain information (Core Ability)	yes no not observed	
6 you generate new and/or creative ideas (Core Ability)	yes no not observed	

Modifies/Deletes Database Records Checklist

Competency

Modify or delete database records

Linked Core Abilities

Demonstrate basic academic skills Apply critical thinking and information processing skills Relate to the complex interrelationships of systems Work with a variety of technologies

Directions

After you have gained some proficiency in the design of a database and in modifying database records for various business purposes, you will be asked to demonstrate your skills to meet a specific need in the workplace and/or in a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Criteria	Rating	Comments
1 you append, change, and delete fields as necessary	yes no not observed	
2 you append, change, and delete records as necessary	yes no not observed	
3 you rename a field as necessary	yes no not observed	
4 you reorganize fields in database as necessary	yes no not observed	
5 you organize and maintain information (Core Ability)	yes no not observed	
6 you work to solve problems that are identified (Core Ability)	yes no not observed	

Multiple Databases Checklist

Competency

Organize data using multiple database

Linked Core Abilities

Demonstrate basic academic skills Apply critical thinking and information processing skills Relate to the complex interrelationships of systems Work with a variety of technologies

Directions

After you have gained some proficiency organizing data in multiple databases, you will be asked to demonstrate your skills to meet a specific need in the workplace and/or in a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Criteria	Rating	Comments
1 you retrieve data from more than one database	yes no not observed	
you query for specific and relevant data as requested	yes no not observed	
3 you logically organize requested data fields	yes no not observed	
4 data is labeled appropriately	yes no not observed	
5 you communicate information using a computer (Core Ability)	yes no not observed	
6 you organize and maintain information (Core Ability)	yes no not observed	
7 you generate new and/or creative ideas (Core Ability)	yes no not observed	

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Mathematical Calculations—Spreadsheets Checklist

Competency

Use mathematical calculation features within spreadsheets

Linked Core Abilities

Demonstrate basic academic skills Apply critical thinking and information processing skills Relate to the complex interrelationships of systems Work with a variety of technologies

Directions

After you have gained some practice using mathematical calculations in spreadsheets, you will be asked to demonstrate your skills to meet a specific need in the workplace and/or in a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

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1	you enter appropriate formulas into specific cell(s) to manipulate variable data as needed	yes	no	not observed	
2	you use correct symbols for addition, subtraction, multiplication, and division	yes	no	not observed	
3	you use parentheses correctly to indicate hierarchy of mathematical computations	yes	no	not observed	
4	you solve problems after choosing from a variety of mathematical techniques (Core Ability)	yes	no	not observed	
5	you organize and maintain information (Core Ability)	yes	no	not observed	

Spreadsheet Applications Checklist

Competency

Use spreadsheet applications to analyze and make decisions

Linked Core Abilities

Demonstrate basic academic skills
Use effective personal and interpersonal skills
Apply critical thinking and information processing skills
Relate to the complex interrelationships of systems
Work with a variety of technologies

Directions

After you have gained some proficiency in using spreadsheets to solve various business problems, you will be asked to use these skills in the workplace and/or in a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Criteria	Rating	Comments
1 you create spreadsheet for a specific purpose	yes no not observed	
2 you create spreadsheet to manipulate variable data	yes no not observed	
3 spreadsheet is organized in a logical, sequential manner	yes no not observed	
4 you appropriately label and format cells	yes no not observed	
5 you organize and maintain information (Core Ability)	yes no not observed	
6 you select resources for a task that are appropriate to the system (Core Ability)	yes no not observed	